I-SMART – Creating Staff Accounts

Agency Administrator

Overview: An agency administrator is typically assigned the responsibility of adding all new staff to the system and setting up their access. For any staff member who does not have access to the system and needs to be given access, the agency administrator has to follow a minimum of 4 steps in the following sequence.

Staff Profile Creation

In the Agency/Staff module:

1. Create **Staff Profile** with at least the minimum required (dark yellow) fields.

2. Assign Facilities to the staff under the menu item **Staff Assignment**.

3. **Create Login** for the staff member on the Account Information screen.
    - Enter a User Login ID in the field provided under the User Information heading. This can be any user id the administrator wishes, but it must be unique to that user.
    - In the Administrative Actions box at the bottom of the screen, click the Create Account link. This will create both the user's password and pin and send them to the email shown in the User Email field.

4. Define the role and access rights for the staff under heading **System Access**.
    - For agencies using the complete clinical file system, pick roles from the Job Function Roles slider box. Choose **Client Diagnosis** from the Role Attributes slider box, if your agency uses that screen. The choices will typically be as follows:
        - Clinician: **Case ReOpen**, **Clinical (Full Access) rights**, **View Consented Clients**, **Group Notes – Add Group**
        - Staff administrator: Same as above but add Staff Administrator to Assigned Job Function Roles box
    - For agencies using I-SMART to only enter data into the system, the choices will be **Case ReOpen** from the Job Function Roles box and **Iowa Reporting** from the Role Attributes box.

5. The agency administrator can also Remove, Enable, and Disable accounts and Reset Credentials (change password and pin) by using the links located in the Administrative Actions box at the bottom of the Account Information screen.
    - ***Remove Account***: Removes user's rights to access the system
    - ***Enable Account***: Enables user's account if it should become disabled
    - ***Disable Account***: Disables user's ability to log in.
    - ***Reset Credentials***: System sends user a new password and pin to email shown on user's staff profile screen
    - ***Release Lock***: Allows user to log into system from another computer if he/she did not log out from previous computer.
    - ***Expire Credentials***: Renders the user's password and pin unusable

Removing staff accounts

1. **Note** – Staff cannot be deleted because of their association with client files. You can, however, remove their accounts and remove them from staff drop down lists by following the instructions below.
    - Find the staff using the Staff List search function

2. **Staff Profile** screen: Place an end date in the End Date field

3. **Staff Assignment** screen: Move the facility name from the <u>Facilities Approved For</u> to the <u>Facilities Not Approved For</u> slider box

4. **Account Information** screen: If the staff has user rights, click the **<u>Remove Account</u>** link to disable their rights to access.

***Note**: A person must have the **Staff Administration** role in order to create/modify staff records.